



## Blueberry 2014 Chain Menu Survey Summary

US Highbush Blueberry Council



# HOW WAS THE RESEARCH DONE?

- Conducted by Technomic\*, January 2014
- Computer survey/scan
  - Reviewed menus from the Top 500\*\* restaurant chains, emerging chains and top-tier independents
  - Comparison for second-half of years 2007, 2010 and 2013
  - Finding menu incidence of blueberries, other berries and other fruits

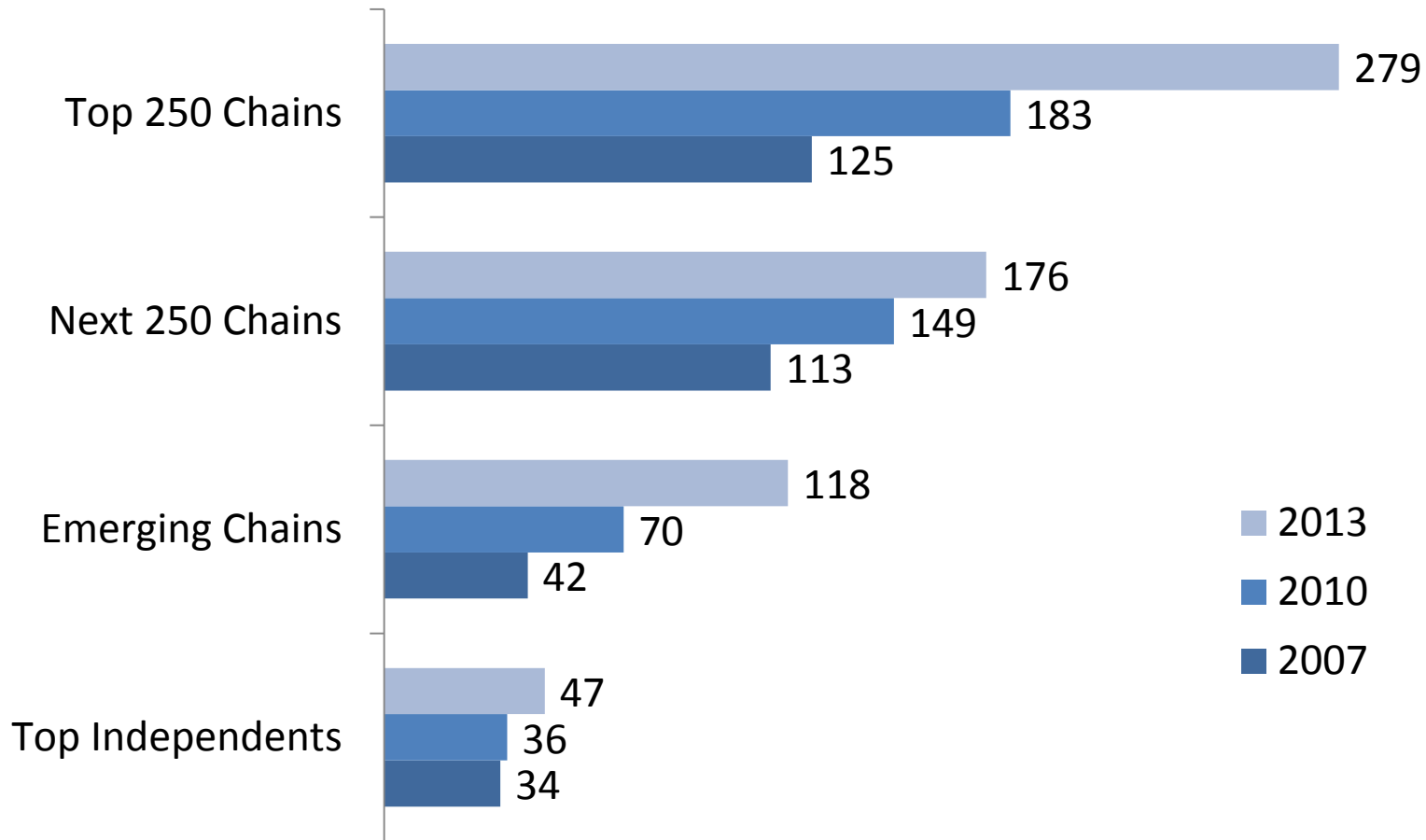
## WHAT WE FOUND

### *Blueberries: Taking menus by storm*

- Blueberries are among top 15 fruits menued by chain restaurants
- Total blueberry mentions on overall menus (quick-service, family, fast casual, casual, mid-scale, fine dining)
  - 2007 to 2010: 39% growth
  - 2007 to 2013: **nearly 100% growth**Increase is similar to cranberries, ‘other berries’ and ‘wild berry’
- Fresh blueberry mentions on overall menus
  - 2007 to 2010: **82% growth**
  - 2007 to 2013: **176% growth**

# WHAT WE FOUND

## *Blueberries: Increased mentions on Top 500\* chain menus*



Base: Jul-Dec 2013 – 8953 items from 773 restaurant menus from the Top 500 Restaurants, Emerging and Independent Operators; Jul-Dec 2010 - 4665 items from 548 restaurant menus from the Top 500 Restaurants, Emerging and Independent Operators; Jul-Dec 2007 – 3158 items from 440 restaurant menus from the Top 500 Restaurants, Emerging and Independent Operators;  
Source: MenuMonitor, Technomic. Inc.

# WHAT WE FOUND

## *Blueberries: Gaining ground in drinks, entrees and desserts*

- Non-alcohol beverages, including smoothies\*
  - 2007 to 2010: 43% growth
  - 2007 to 2013: **93% growth**
- Entrees/main dishes, including salads
  - 2007 to 2010: 36% growth
  - 2007 to 2013: **66% growth**
- Dessert
  - 2007 to 2010: 5% growth
  - 2007 to 2013: **45% growth**
- Kids menus
  - 2007 to 2013 from 10 mentions to 21; room for growth!

### **Beverage Trends 2014**

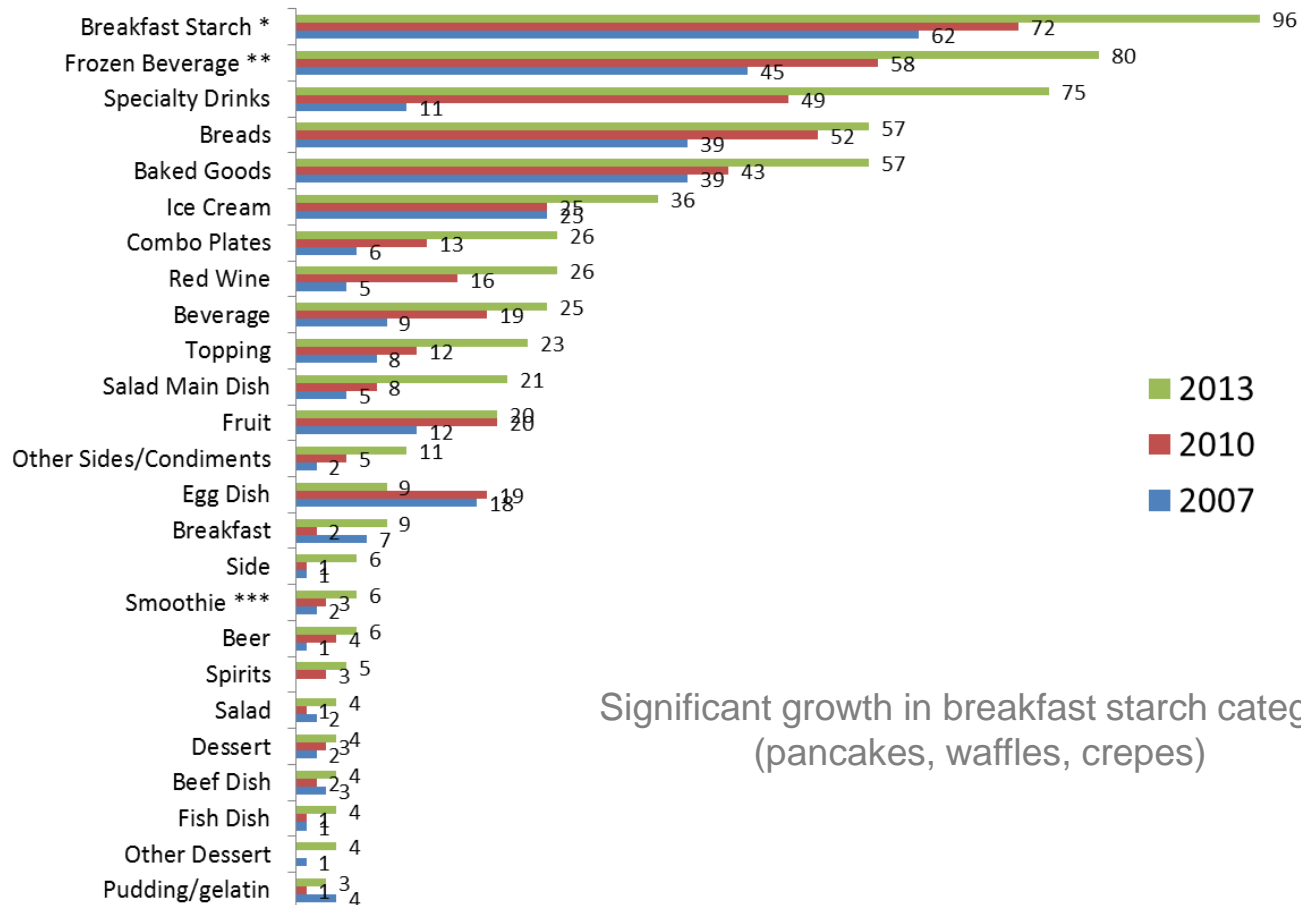
1. House-made soft drinks
  2. Gourmet lemonade
  3. Coconut water
  4. Specialty iced tea
  5. Dairy-free milk
- *US News & World Report*

### **All-Day Desserts**

35% of adults said they eat desserts as mid-morning snacks at least once a week. Nearly half said they eat dessert as an afternoon snack. – *Technomic 2013 Dessert Consumer Trend Report*

# WHAT WE FOUND

## Blueberries: Changes by course categories

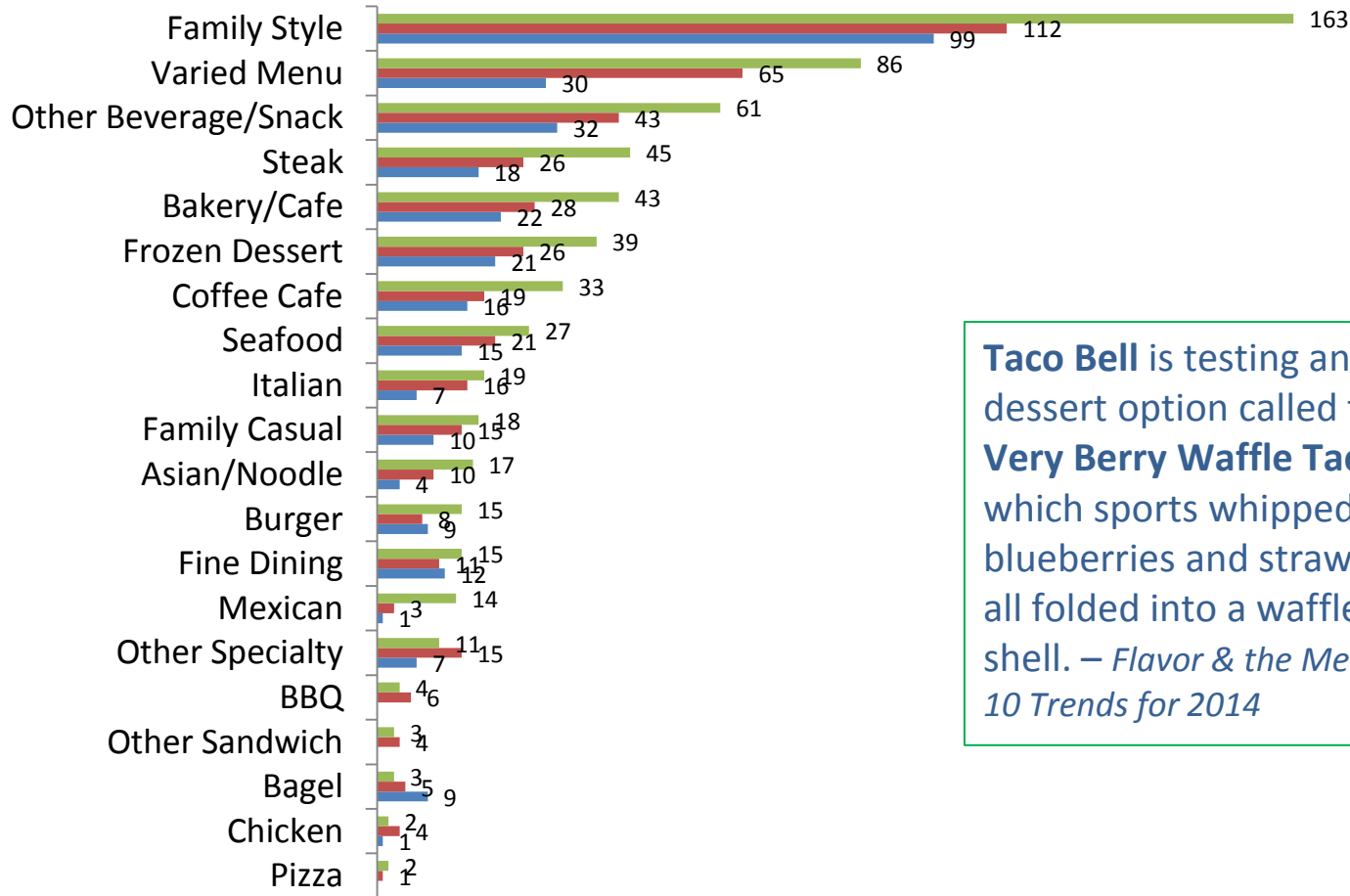


Significant growth in breakfast starch category  
(pancakes, waffles, crepes)

Base: Jul-Dec 2013 – 8953 items from 773 restaurant menus from the Top 500 Restaurants, Emerging and Independent Operators; Jul-Dec 2010 - 4665 items from 548 restaurant menus from the Top 500 Restaurants, Emerging and Independent Operators; Jul-Dec 2007 – 3158 items from 440 restaurant menus from the Top 500 Restaurants, Emerging and Independent Operators;  
Source: MenuMonitor, Technomic, Inc.

# WHAT WE FOUND

## Blueberries: Growth in nearly every concept type

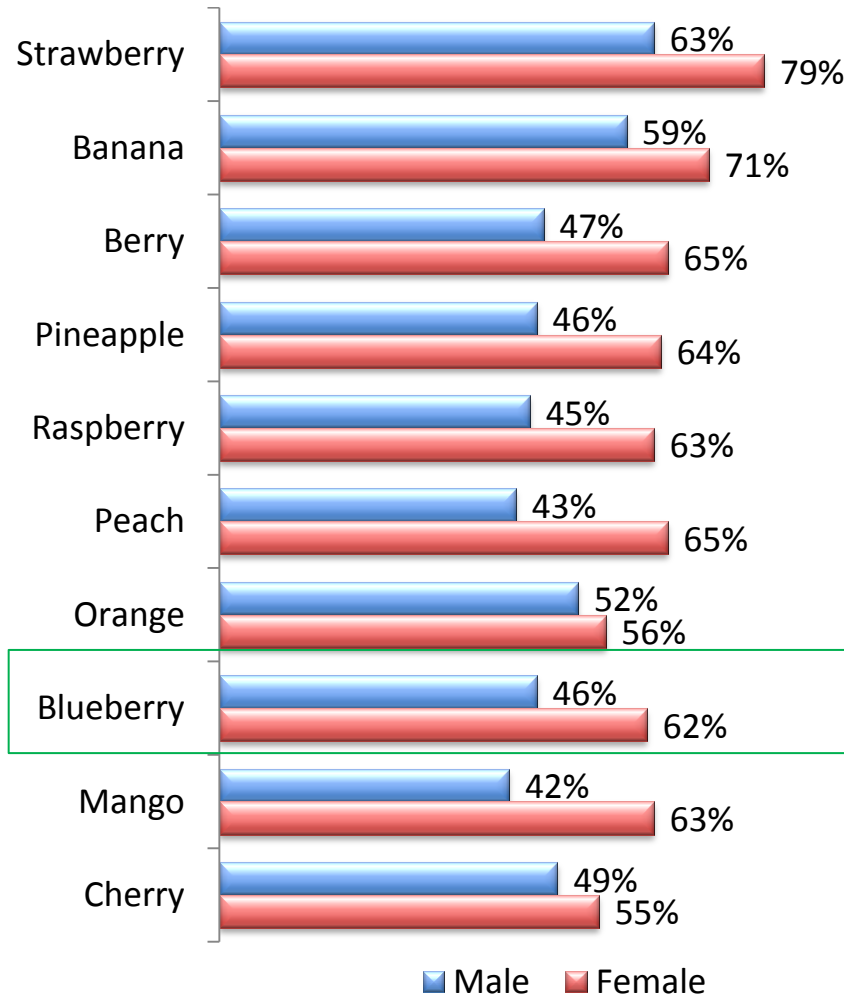


**Taco Bell** is testing an all-day dessert option called the **Very Berry Waffle Taco**, which sports whipped cream, blueberries and strawberries, all folded into a waffle taco shell. – *Flavor & the Menu/Top 10 Trends for 2014*

Base: Jul-Dec 2013 – 8953 items from 773 restaurant menus from the Top 500 Restaurants, Emerging and Independent Operators; Jul-Dec 2010 – 4665 items from 548 restaurant menus from the Top 500 Restaurants, Emerging and Independent Operators; Jul-Dec 2007 – 3158 items from 440 restaurant menus from the Top 500 Restaurants, Emerging and Independent Operators; Source: MenuMonitor, Technomic, Inc.

# WHAT WE FOUND

## *Blueberries: Riding the smoothie wave*



54% find blueberry an appealing smoothie flavor

Preferred by more women than men

Base: 624 consumers aged 18+  
Source: Technomic, Inc., *The Flavor Consumer Trend Report (2013)*



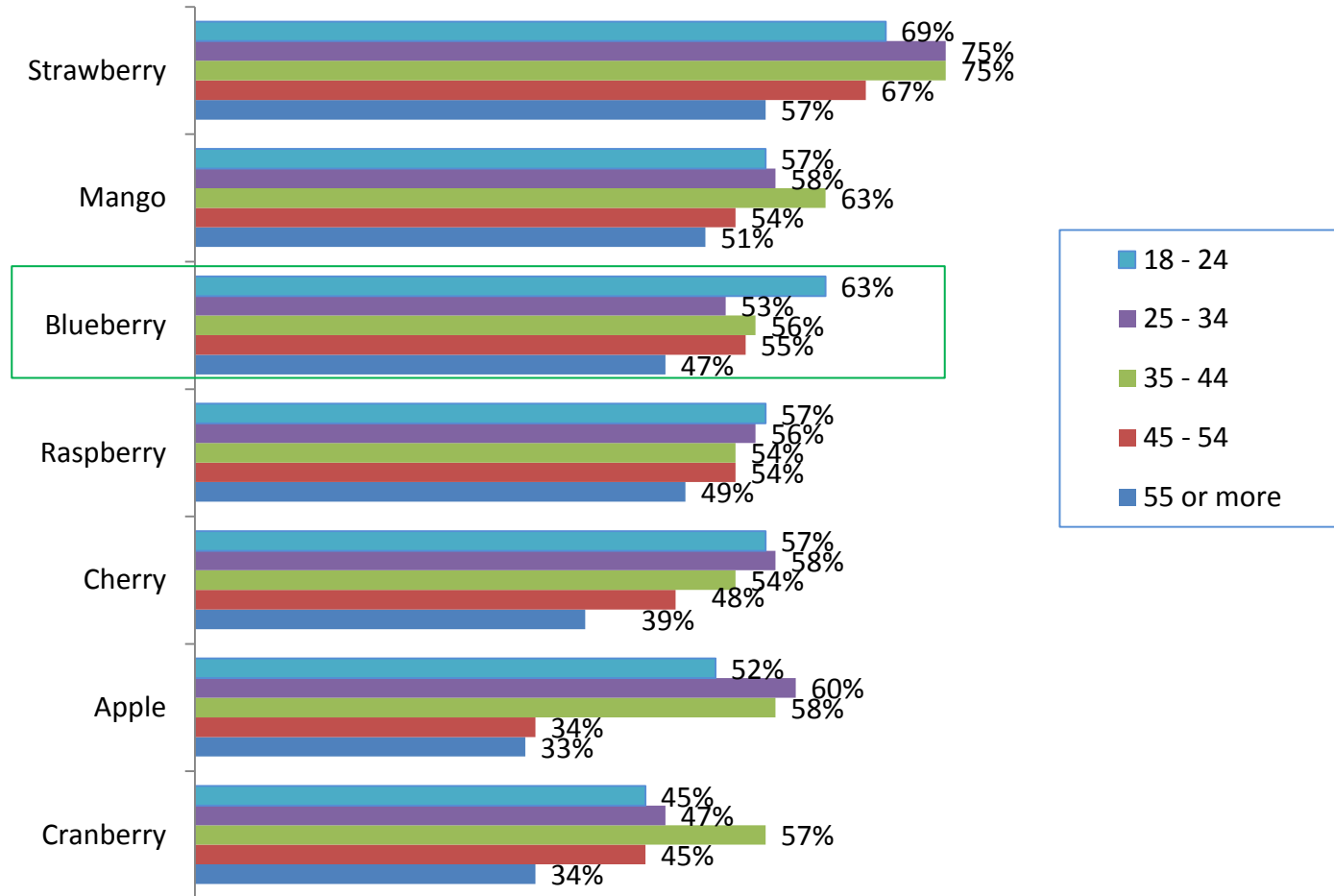


# WHAT WE FOUND

## *Blueberries: Riding the smoothie wave*

Which of the following flavors do you think are appealing for fruit smoothies offered at a restaurant? Select all that apply. (by age)

Most popular among young millennials



Base: Approximately 250 consumers aged 18+  
Source: The U.S. Beverage Consumer Trend Report (2012) Technomic, Inc.



# WHAT WE FOUND

*More growth than strawberry, raspberry, blackberry; comparable to cranberry and wild berry*

## Menu Incidence of Berry Mentions on U.S. Menus, By Segment

2007								
	Blueberry	Strawberry	Raspberry	Cranberry	Other Berries	Blackberry	Wildberry	TOTAL
Casual Dining	53	550	428	340	59	100	37	1567
Fast Casual	24	78	30	47	2	13	2	196
Fine Dining	38	98	89	37	36	59	3	360
Midscale	100	251	69	59	27	8	2	516
Quick Service	99	422	147	38	13	24	8	751
<b>Total</b>	<b>314</b>	<b>1399</b>	<b>763</b>	<b>521</b>	<b>137</b>	<b>204</b>	<b>52</b>	
2010								
	Blueberry	Strawberry	Raspberry	Cranberry	Other Berries	Blackberry	Wildberry	TOTAL
Casual Dining	132	831	612	577	138	171	56	2517
Fast Casual	36	90	33	56	5	11	2	233
Fine Dining	31	156	105	60	42	70	2	466
Midscale	113	256	65	75	22	13	11	555
Quick Service	126	501	174	57	22	20	14	914
<b>Total</b>	<b>438</b>	<b>1834</b>	<b>989</b>	<b>825</b>	<b>229</b>	<b>285</b>	<b>85</b>	
2013								
	Blueberry	Strawberry	Raspberry	Cranberry	Other Berries	Blackberry	Wildberry	TOTAL
Casual Dining	170	1037	772	672	215	200	77	3143
Fast Casual	53	125	66	76	3	22	3	348
Fine Dining	57	221	171	105	75	113	4	746
Midscale	167	370	88	120	35	21	4	805
Quick Service	173	639	211	96	35	36	13	1203
<b>Total</b>	<b>620</b>	<b>2392</b>	<b>1308</b>	<b>1069</b>	<b>363</b>	<b>392</b>	<b>102</b>	

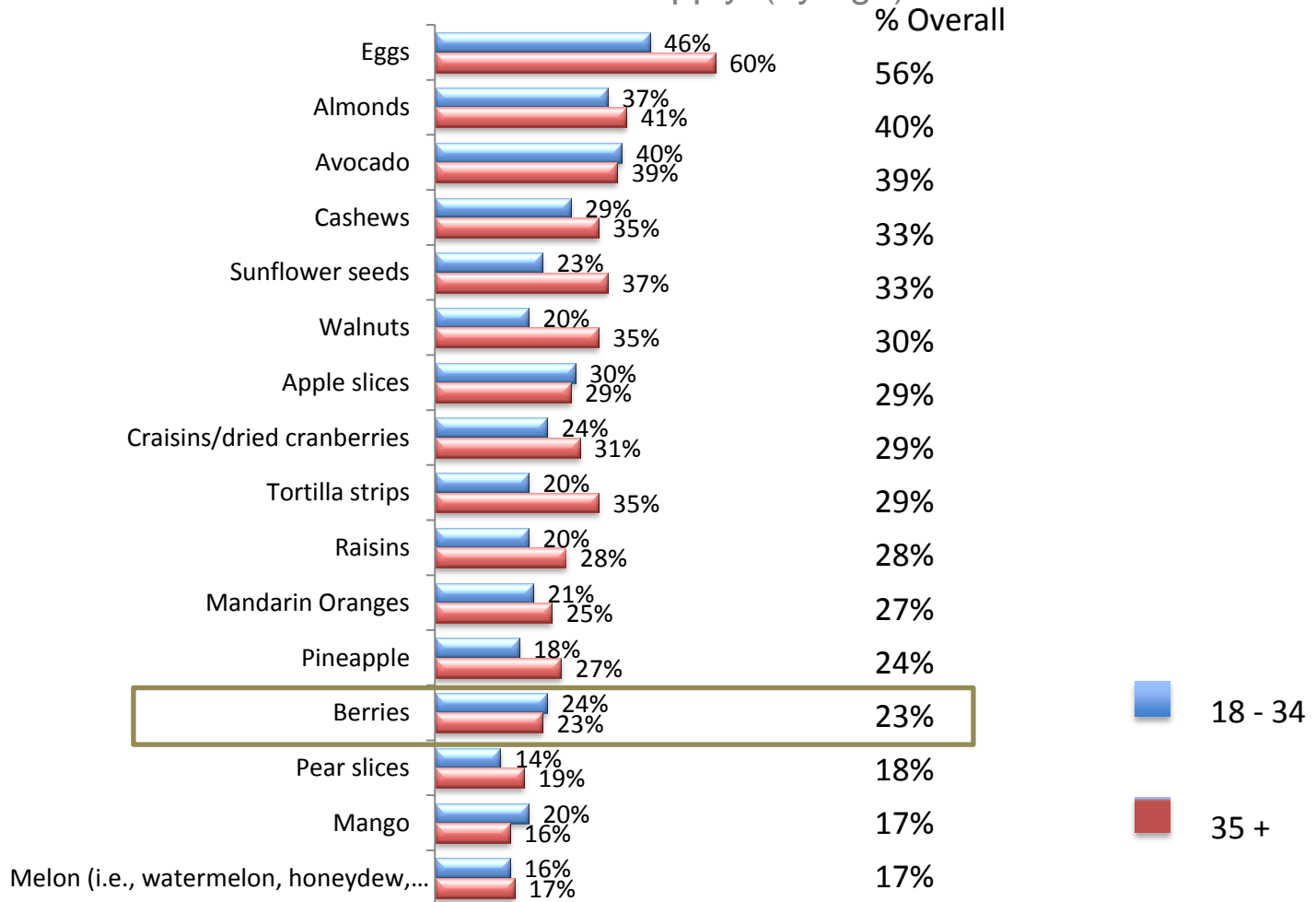
# WHAT WE FOUND

*Blueberries: most popular on family-style menus*

	Baked Goods	Beer	Beverage	Breads	Breakfast	Breakfast Starch	Combo Plates	Egg Dish	Frozen Bev	Fruit	Ice Cream	Other Sides/Condiments	Red Wine	Salad Main Dish	Side	Smoothie	Specialty Drinks	Spirits	Topping	Total
Asian/Noodle	2		1						2		2					1	3		2	13
Bagel	1			1		1														3
Bakery/Cafe	2		2	18		7			6	4				3	1					43
BBQ						1				1			1				1			4
Burger						1			7	1	2	2							2	15
Coffee Cafe	1		2	17		4			4			3			1					32
Family Casual	5		2	6		4													1	18
Family Style	19		1	6	8	67	24	9	2	3	7	4		2	2				5	159
Fine Dining	5			2		2	1		1	1										12
Frozen Dessert									7		20	1			2				8	38
Italian	1		1								3	1	3	2			6	1	1	19
Mexican													2				11			13
Other Bev/Snack			2	1		3			46	2	1					5			1	61
Other Sandwich			2											1						3
Other Specialty				4		2				1				1					2	10
Seafood	5	1	1	1		1	1		4	1				2			7			24
Steak	4									3	1		15				17	1		18
Varied Menu	11	5	11	1	1	2			1	2			5	10			30	3	1	84
<b>Grand Total</b>	<b>57</b>	<b>6</b>	<b>25</b>	<b>57</b>	<b>9</b>	<b>96</b>	<b>26</b>	<b>9</b>	<b>80</b>	<b>20</b>	<b>36</b>	<b>11</b>	<b>26</b>	<b>21</b>	<b>6</b>	<b>6</b>	<b>75</b>	<b>5</b>	<b>23</b>	

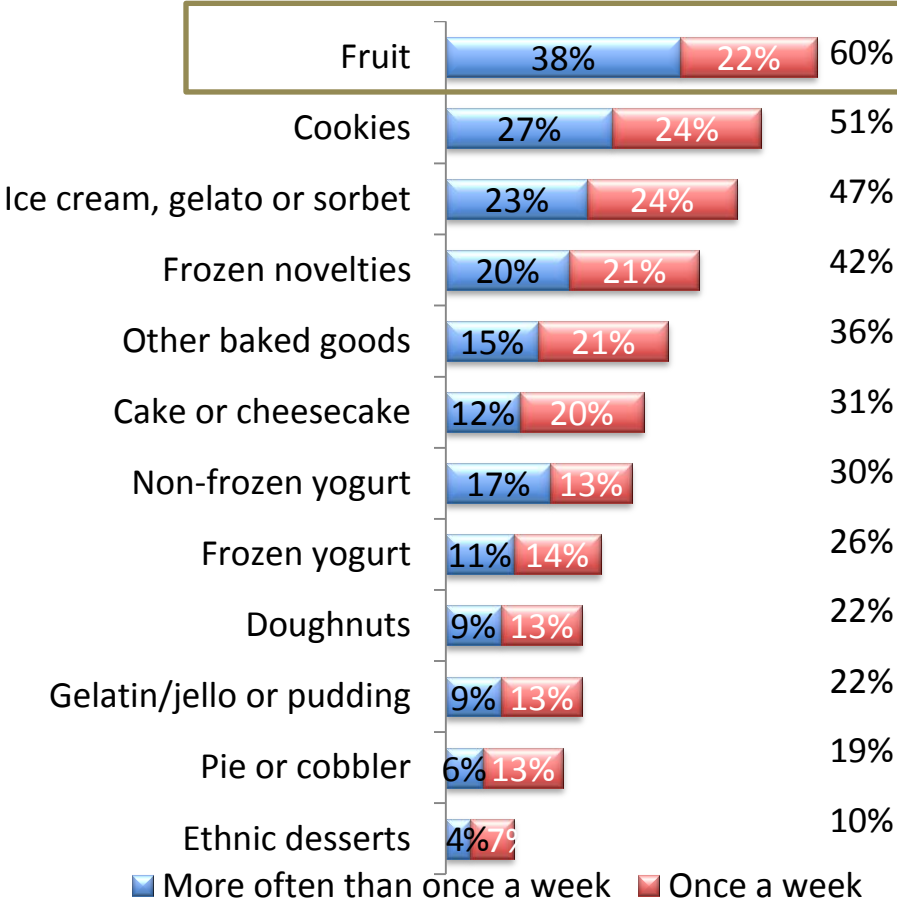
# Blueberries and *Salads*

What toppings would you consider ordering as part of a **restaurant salad**?  
Select all that apply. (by age)



# Blueberries and *Dessert*

Please indicate how often you consume the following as desserts.

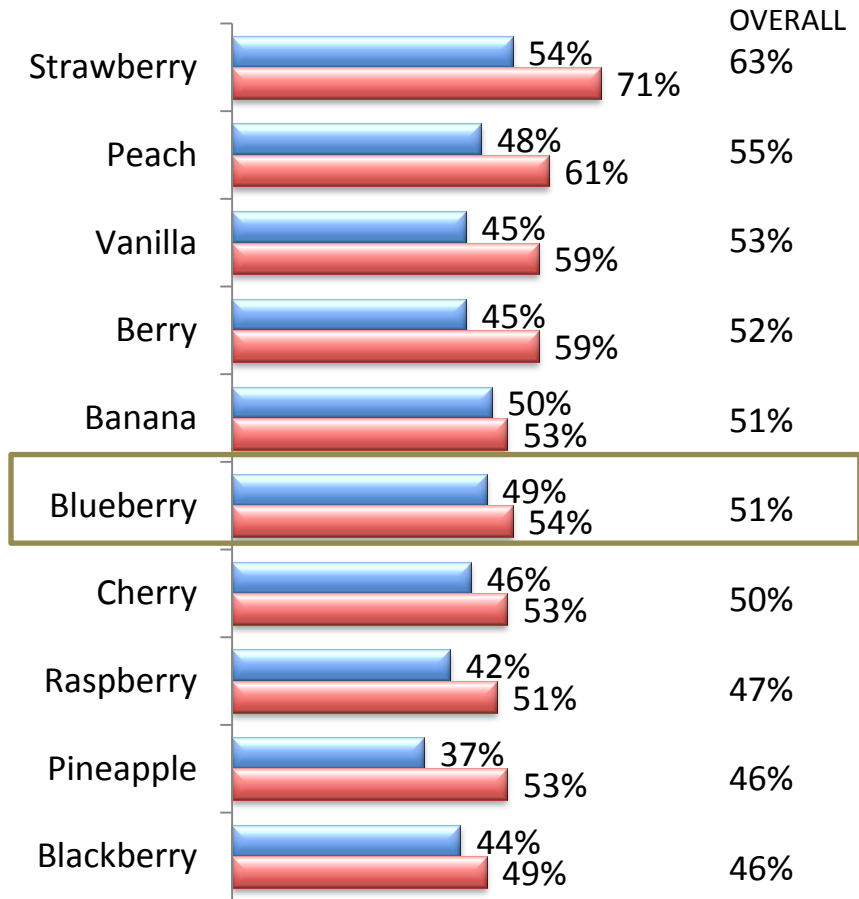


Base: 1,500 consumers aged 18+  
 Sum of percentages may not total cumulative percentage due to rounding  
 Source: Technomic, Inc., *The Dessert Consumer Trend Report* (2013)



# Blueberries and *Yogurt and Frozen Yogurt*

Which of the following flavors do you think are appealing for **yogurt and frozen yogurt**?  
Select all that apply. (by gender)

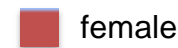


Frozen yogurt chain **Pinkberry** offers **blueberries** as a **topping** and ranks third in Technomic's list of healthy, female-friendly brands.

The **Orange Leaf** menu includes frozen yogurt flavors

- **King of the Berries: Blueberry**
- **Pomegranate-Blueberry**
- **Banana-Blueberry**

Base: 683 consumers aged 18+  
Source: Technomic, Inc., *The Flavor Consumer Trend Report (2013)*



# Relating consumer findings to foodservice

- Consumer insights reflect CAMS findings
  - 2013 Hebert Consumer U&A finds that
    - **99%** of Americans believe that “blueberries are healthy”
    - **84%** of Americans like blueberries because “they have health benefits”
    - **58%** said they perceive blueberry dishes on menus as healthier

For more information or to obtain the full report,  
please contact:

Mark Villata, Executive Director  
U.S. Highbush Blueberry Council  
916-983-0111  
[mwillata@blueberry.org](mailto:mwillata@blueberry.org)